SUGGESTED DEFAULTS IN TAXWISE 2008

REVISED 12/12/2008

(For the latest defaults, check the AARP Tax-Aide Extranet at aarp.org/tavolunteers

This document contains many suggestions; local practices should prevail. There are actually very few "have to" settings.

The document consists of 3 major parts:

- Part 1 - Setup Options
- Part 2 - Tax Form Defaults for the "Admin" user
- Part 3 – User Groups and Site-specific Users

This document introduces downloadable files that you can use to install the Tax Form Defaults suggested in Part 2. It's a real time saver! Most of what is left for you to do is to insert your State and Site specific information.

Also new in TaxWise 2008, the "SuperUser" group where new users are automatically assigned no longer permits members of that group to Edit Tax Form Defaults. See page 12 for instructions on creating new groups to which users can be assigned that will allow their members to edit their own Tax Form Defaults.

Part 1 – Setup Options

Login to TaxWise™ using the "Admin" user name. Select "Tools," then "Utilities/Setup Options." Then in the Utility program select "Setup," then "Setup Options" to open the setup options screens.

GENERAL TAB, ITEM 4: Check the second box in the Miscellaneous Options section and make sure that the first and third boxes are not checked. **The second item must be checked for the Data Retention question in Preparer's Use Field 3 to work properly.**

COLOR SCHEME (OPTIONAL): The newer default colors are easier on the eyes than the Classic colors, but modifications are required to make it easier to see the lines beneath the required, calculated, and overridden fields.

COLOR SETUP TAB: Select "My Custom Colors" then:

(a) Select the "Required Entry" item. Set the bottom borderline width to "4."
(b) Select the "Calculated Entry" item. Set the bottom borderline width to "4."
(c) Select the "Overridden Entry" item. Set the bottom borderline width to "4"; then set the background color to light grey and the foreground color to bright red.
(d) Then select "Finish" to exit the setup options screens.

Part 2 – Tax Form Defaults (TFDs) for the "Admin" user

Forms Tree Preferences for Tax-Aide Sites. Local circumstances and preferences need to be considered.

- Some sites strongly prefer a minimum of forms in the TaxWise™ forms tree; for these sites, many of the suggested defaults listed below need not be used. If this is your preference, go to \UTS08\USERS\ADMIN\. Delete the 8I000000.000 file (for Tax Year 2008).
- Many sites prefer to start with an expanded forms tree. The settings in the rest of this Part of the document are intended for those sites. This procedure creates a richly-populated tree that may contain more forms than you want to include in your tree. If you use the automated process to install these TFDs, you can then quite easily trim the suggested tree to suit your preferences. It is easier to remove forms from a tree than to get them to be there and stay there when editing TFDs.

The process of setting TFDs in TaxWise can occur at multiple levels, not all of them used by every State, District, or Site. The process used and the settings themselves are very much up to local preferences at the lower levels.

These levels are:

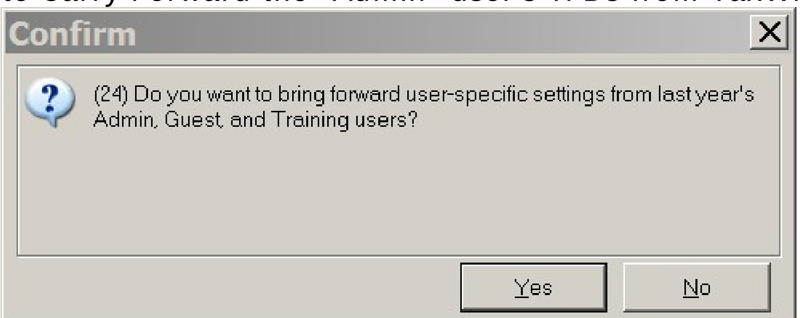
1. **Basic:** TaxWise sets basic program defaults in the software itself that are preset even in the absence of any TFD file (8i000000.000) in the "Admin" user.
2. **Pub 3189:** TaxWise presets the initial "Admin" user's TFDs for VITA/TCE based on Pub 3189.
3. **Carryforward:** TaxWise can try to carry forward the "Admin" user's TFDs from last year (**not recommended – see below**).
4. **NTC:** The AARP Tax-Aide National Technology Committee (NTC) provides suggested additional National-level TFD settings for the "Admin" user in this document.
5. **State:** Tax-Aide Technology Specialists may customize the NTC's "Admin" user's TFDs for their states.
6. **District:** Tax-Aide district Technology Coordinators (TCs) may further customize their State's "Admin" user TFDs for their districts. The TC coordinates with the district's Training Coordinator to make sure that the district's TFDs match what is being taught in the district training classes.
7. **Site-specific:** The district TC (or an LC or DC acting as TC) or the ERO finally customizes the TFDs for each specific Tax-Aide Site.
   A. If the computer setup is only for one site, the site-specific settings are included in the TFDs for the "Admin" user.
   B. If the setup is for more than one site, the site-specific settings are not included in the TFDs for the "Admin" user, but are set in the TFDs for each site-specific TaxWise user.

In the procedure below, we shall first set the "Admin" user's TFDs to the NTC-suggested defaults. After we establish the NTC-suggested defaults, we will then present State and District-level customizations of the "Admin" user's TFDs. After that is done will be the time to configure additional TaxWise users and groups. The "Admin" user's TFDs will be copied to both existing users and new users unless the user is in a group whose members are permitted to set their own defaults. Do not put users into a group in which they can set their own defaults until you have set the defaults that you want for ALL users in the “Admin” user. Setting unique defaults for specific users will be covered in Part 3 of this document.

The assumed starting point for the following suggestions is the “Admin” user’s TFDs that were shipped with Release 23.00 of TaxWise for 2008. The required defaults shown in IRS Pub 3189 are supposed to be preset in that release. The optional defaults listed in IRS Pub 3189 are not intended to be preset and may be listed in this document.

DO NOT LET TAXWISE TRY TO CARRY FORWARD THE “ADMIN” USER’S TAX FORM DEFAULTS FROM LAST YEAR!

During the initial launch after installation of TaxWise 2008, you may be given the option to Carry Forward the “Admin” user’s TFDs from TaxWise 2007:



DO NOT ACCEPT! The program does not do this function correctly and by attempting to do so will mess up the “Admin” user’s TFDs that were shipped with the program based on the 2008 Pub 3189. If you have already accepted this offer, uninstall TaxWise and start over, and do not let the program try to do it this time. Alternatively, you can restore the as-shipped Tax Form Defaults for the “Admin” user from the downloadable folder described below.

Downloadable and Installable NTC-suggested TFDs

Along with this document, we are publishing on the Technology page of the AARP Tax-Aide ExtraNet a **TFD file (8i000000.000)** and a **User History List file (8iuserlist.uhl)** containing these NTC-suggested defaults for the “Admin” user. If you like, you can install the NTC-suggested defaults into your installation of TaxWise by copying those files into your \UTS08\USERS\ADMIN\ folder. The compressed downloadable folder containing these files is called “**NTC ADMIN TFDs 2008mmyy.zip**.” It also contains the as-shipped defaults for the “Admin” user that you can use to un-do the effects of trying to bring these defaults forward from last year.

To access these files, right click on the zip file’s name on the ExtraNet Technology page and select “Save Target As…” In the “Save As” dialog box specify where on your computer you want the .zip file saved. Locate the .zip file on your computer. Right click on the file and select “Extract All…” In the Extraction Wizard, click “Next” to have the extracted folder saved in the same folder that contains the .zip file. Open the extracted folder and read the “readme” file that you will find there for further instructions.

EDITING TAX FORM DEFAULTS FOR THE "ADMIN" USER

To open tax form defaults.

- Log in to TaxWise™ with the "Admin" user name.
  Select Tools, then Edit Tax Form Defaults.
- Click on the OK button on the next screen.
- Click the Yes button on the confirm screen.

The "Main Info" (**Main Information Sheet**) will be automatically opened when Edit Tax Form Defaults is first entered. When a form is opened, it will appear as a regular tax form, except that it will have a yellow border to remind you that you are setting defaults that will apply to all new returns for this user name.

NOTE 1: If there are not both left and right panels on the screen, click on the 'Forms Tree' icon to toggle between 'Open Tree View' and 'Normal View'.

NOTE 2: F3 marks a field red for required info or removes red from that field.

To select other forms, click on the desired form in the left panel or, if the desired form is not listed, first close the presently open form and then select a form from the listing in the right panel of the display. You can also link to a form from any line on form 1040 – for example, at Line 7, press F9 and select "NEW W2 Wage and Tax Statement" to enter taxpayer earnings.

To close a form, click on the "Close this form" tab or press F10.

Level 4 – NTC-Suggested National-level TFDs for the "Admin" user

If you have installed the Downloadable and Installable NTC-suggested TFDs from the "NTC ADMIN TFDs" folder posted on the Technology page of the AARP Tax-Aide ExtraNet, skip this section and continue at "Level 5" on page 10.

Main Information Sheet

- Use F3 to make Present home address, Zip code, and Daytime Telephone number for the Taxpayer red.

- **State Information**
  Put an "X" in the "If you are not preparing a state return, check here" box and do not fill in the Full year resident state.

- **Self-Select and Practitioner PIN(s)**
  Leave the Taxpayer's PIN field empty and red.
  Use F3 to make the "Date" field red on the line with the Taxpayer's PIN.
  Put an "X" in the "I authorize" box for the Taxpayer.
  Put an "X" in the "I authorize" box for the Spouse.

- **Preparer Information**
  Leave the PTIN field empty and red.
  Non-paid preparer indicator: Leave this field blank.

- **Preparer's Use Fields**
  These fields are used for various purposes. Reports can be prepared using the information in these fields. The following are suggested uses for these Preparer's Use Fields:
  Field 1 – Preparing Volunteer's Initials (no default needed – use F3 to make it red)
  Field 2 - Quality Review Volunteer's Initials (no default needed – use F3 to make it red)
  Field 3 - This field can be used for sites that ask taxpayers for permission to retain taxpayer data (defaults must be set from the "Admin" user)
    - Right click in Field "3" and a menu will appear.
    - Select "Edit History List and a "User Defined History List" window will appear.
    - In the "Add an item to the list" box, type "ASK Retain Question" and press "Enter."
    - Then type "RETAIN" and press "Enter."
    - Then type "DO NOT RETAIN" and press "Enter."
    - Be sure that "ASK Retain Question" is at top of the list; use up-arrow if needed.
    - Click on "Lock List."
    - Hit "OK."
    - Click on the arrow in Field 3 to open the drop-down list.
    - Select "ASK Retain Question."
    - Click on the field again.
    - Press F3 to turn the red on to make this field mandatory.
    - Click on any other field to complete the process.

If you have more topics that you want to track, repeat the above.

As shipped by CCH, **Preparer's Use Fields 11 and 12 contain two new questions** regarding a language other than English spoken in the home and a person in the household with disabilities. Asking these questions is optional for the AARP Tax-Aide program.

- To make these questions work correctly, use the same techniques that were used above for Field 3 to configure them. We have done this in the NTC-suggested TFDs.
  - For Field 11, add "ASK" and "None" to the history list and set it up so that the field is red and contains the word "ASK."
  - For Field 12, add "ASK" to the history list and set it up so that the field is red and contains the word "ASK."

- If you want to remove these questions from the TFDs, for each of the fields:
  - Right click on the long description that contains the question
  - Select "Unlock Entry"
  - Press the space bar to replace the question with blanks
  - Click on the short "answer" field.
  - Select the blank answer.
  - Click on the field again.
  - Use F3 to remove the red.

- o Click on any other field to complete the process.

Once completed, the site coordinator/*e-file* administrator can provide a legend to the volunteers to assist them in the completion of these fields.

Fields 1 & 2 are 8 digit alpha-numerical, Field 3 is 20 digit alpha-numerical, Fields 4, 5 & 6 are 10 digit numerical, Field 7 is 3 digit alpha-numerical and Fields 8, 9,& 10 are 15 digit alpha-numerical.

- **Last lines on form:** (Optional) Any text may be entered on the last lines of the form. You may want to use these lines to indicate your usage of the Preparer's Use Fields, as we have for Fields 1 and 2.

- Press F10 to close the Main Information form.

8879 Declaration for Electronic Filing

- Leave the "EFIN" field at the top of the form empty and red.
- Scroll to "**Electronic Return Originator (ERO) Information**" at the bottom.
    - Click in "SSN" Field. Press F3 to remove the red. (No data to be entered)
    - Leave the "PTIN" field empty and red.
    - Leave the "Firm's Name" field empty and red.
    - Leave the "Print Signature" box checked. This will print your site information on the Signature line.
    - Leave the "Firm's Address" field empty and red.
    - Leave the "EIN" field blank.
    - Leave the "Zip Code" field empty and red.
    - Leave the "IRS Only" box checked and locked.
    - Press F10 to save and move to the next form.

W-2 Wages

- Press F3 on the Name code in block b to remove the red.
- Block 15, State: Use F3 to turn this box red but do not put anything in it.
- Press F10 to close the form.

Schedule A (& Itemized Deduction Detail & Sales Tax Worksheets)

- Open "1040 PG 2" (Form 1040, page 2), and select the field for line 40 (Itemized deductions or Standard Deduction). Right click, and then select "Link." Select "NEW Sch A - Itemized deductions" and then double click to open it.
- Select item 1 and press F9 to link, then select "New A Detail – Itemized Deduction Detail Worksheet" and then press OK.
    - On the "Itemized Deduction Detail Worksheet," select the name field for the first line under "Other medical expenses" and press F3 to mark the field red. (This adds the Itemized Deduction Detail Worksheet to the forms tree.)
    - Press F10 to close this form and return to Schedule A.
    - Select the A Detail form again.
    - Use F3 to take the red off the first line under "Other medical expenses"
    - Press F10 to close this form and return to Schedule A.
- On Line 5b General sales tax,
    - Use F3 to remove the red from the field.
    - Link a "NEW Sales Tax worksheet" into this field and open it.

    - Use F3 to turn on the red in the description field on line 3a.
    - Press F10 to close this worksheet and return to Schedule A.
- Under "Taxes You Paid,"
    - click on line 6, "Real Estate Taxes on your principal residence not listed above."
    - Press F3 (marks red).
    - Click on line 7, "Personal Property Taxes not listed above."
    - Press F3 (marks red).
- Under "Interest You Paid,"
    - click on line 10, "Home Mortgage, interest expense and points, from Form 1098, not listed above."
    - Press F3 in first column (marks red).
- Press F10 to close Schedule A.

Schedule B (& "Interest Stmt Interest Income" and "Dividend Stmt Dividend Income" Forms)

- Open Schedule B.
- Click in the "Name" field on line 1a.
- Press F3 to remove the red.
- Press F10 to close Schedule B.

Schedule C-EZ

- Open Schedule C-EZ.
- Click in "Gross Receipts" (line 1).
- Link in a "NEW Miscellaneous Income from 1099 MISC."
    - o Open the 1099 MISC.
    - o Use F3 to take the red off Box 2, Rent.
    - o Use F3 to make red Box 7, Nonemployee compensation.
    - o Press F10 to close the 1099 MISC.
- Press F10 to close Schedule C-EZ.

Schedule D and the Capital Gain/Loss Transaction Worksheet

- Open "1040 PG 1" (Form 1040, page 1), and select the field for line 13 (Capital Gain {or Loss}). Right click, and then select "Link." Select "NEW Sch D pg 1 – Capital Gains and Losses Pg 1," and then double click to open it.
- Select the first description field below the "1a Description of property" column heading. Press F3, and then press enter.
- Reselect this same first description field. Right click, and then select "Link."
- Open the "NEW Cap Gn Wkt - Capital Gain/Loss Transaction Worksheet."
- On the first description field, press F3, then press enter.
- Click on the "Close this form" tab to close the worksheet.
- Click on the "Close this form" tab to close Schedule D.

[The steps above add Schedule D and "Cap Gn Wkt Capital Gain/Loss Transaction Worksheet" to the forms for the return. If entries are not made on these forms, they will not be printed.]

1099-R Distributions from Profit Sharing, Retirement Plans, IRAs, etc.

- Press F3 on the Name code to remove the red.
- Block 11, "State/State ID": Use F3 to turn this box red but do not put anything in it.
- (Optional) In the state-use boxes (to the left of part 10), use F3 to turn box 1 red.
- Press F10 to close the form.

Social Security.

- Go to form “1040 PG1.” Select line 20a (Social Security). Right click, and then select “Link.” Select the “NEW 1040 Wkt1 – Social Security Other Income Worksheet.”
- In the “Taxpayer” column, select the field for “Social security received this year’. Press F3.
- Press F10 to exit the worksheet.

8867 Paid Preparer's Earned Income Credit Checklist

- Open Form 8867.
- “X” the box at the top of form to indicate that Tax-Aide preparers do not have to fill out this form.
- Press F10 to exit the worksheet.

Schedule EIC Worksheet

- Find the “Sch EIC Wkt” in the Add Form dialog and add it to the tree.
- Open the Sch EIC Worksheet.
- “X” the “No” boxes for questions 18, 19 and 20.
- Do not leave these boxes red.
- Press F10 to exit the worksheet.

F/S Tax PD Federal/State Taxes Paid

- Right click on line 63 of 1040 pg 2.
- Link to “New F/S Tax pd……”
- In the “Date of Payment” column,
    - for payment 1, enter 04/15/200x and press F3;
    - for payment 2, enter 06/15/200x and press F3;
    - for payment 3, enter 09/15/200x and press F3;
    - for payment 4, enter 01/15/200y and press F3;
    - where x=8 and y=9 for TaxWise™ 2008 etc.
    - Use F3 to make these dates red so they have to be validated if used.
- Press F10 to close this worksheet.

Return Stage (optional but recommended). This item can only be carried out by logging into TaxWise with the “Admin” User; however, the changes will apply to all other users.

- Open Tax Form Defaults with the “Admin” user.
- Click on the “Return Stage” button, and then select “Edit Return Stage Options.”
- Add the following items to the list (PPIN = Practitioner PIN:
    - EFILE-PPIN-Ready to file
    - EFILE-PPIN-Incomplete
    - PAPER-Ready to file
    - PAPER-Incomplete

- DO NOT FILE
- Select “OK”

Client Letter: (optional). Skip if you do not want to print a client letter.

- Close any open form.
- Enter “letter” in the “Look for” field of the “Find a form” listing.
- Select “Letter.”
- Select the “1040 Letter.CL” file and click “Open.”
- You can edit this letter as desired.
- To save your changes, select the SAVE symbol.
- The “Save As” dialog will ask you to name this letter.
- In the NTC-suggested TFDs, we have named it “Standard 1040 Letter.”
- This will add the letter to the forms tree so that it will be printed with each return.
- Click the “X” above and to the right of the letter to close the letter.

Legal Boiler Plate:

- Remove the “Gen Use” form from the forms tree.
- Remove the “Gen Disclosure” form from the forms tree.
- To remove them, right click on their name in the forms tree and select “Remove Form” and click “OK” to the Delete Confirmation dialog.
- These two forms are not needed. What they are trying to do is done by the AARP Tax-Aide Interview and Intake sheet.

Private forms (list) (optional) The TaxWise™ program provides a feature called “private forms” that can be set as part of the defaults. When all forms for a return are closed, the panel on the right side of the screen lists forms. The default is to list all available forms. But you can create a (smaller) private forms list that only includes the forms your site is authorized to complete and have that list be the default.

To create a private forms list from within “Edit Tax Form Defaults/Initial Forms”:

- Close any open form by pressing F10 so that the panel on the right side of the screen lists forms.
- Click on the item that reads “Can’t find it? Try form filter list.”
- Click on the “Private Forms” button. This will show a screen with two columns—a list of all forms (on the left) and a list of your selected forms (on the right).
- To add a form to your list, click on the desired form in the left column, then click on the “>” button. When you are finished, click “OK” to close this screen.
- Now click on “Use Private Forms.” Your selected forms will be listed as the default when a new return is opened for this user name. (A counselor can still click on “Show All Forms” if a desired form is not in the private forms list.)

When you have completed all default form settings. select “File,” then “Close Return” to close the "Edit Tax Forms" screens and save your changes.

At this point, we have configured the Tax Form Defaults for the “Admin” user to the National-level settings suggested by the NTC. If you install the TFD and User History List files provided on the Technology page of the AARP Tax-Aide ExtraNet by the NTC, the above settings are what you will be installing.

Level 5 – State-specific Customization of TFDs for the “Admin” user

To open tax form defaults.

- Log in to TaxWise™ with the “Admin” user name.
  Select Tools, then Edit Tax Form Defaults.
- Click on the OK button on the next screen.
- Click the Yes button on the confirm screen.

Main Information Sheet

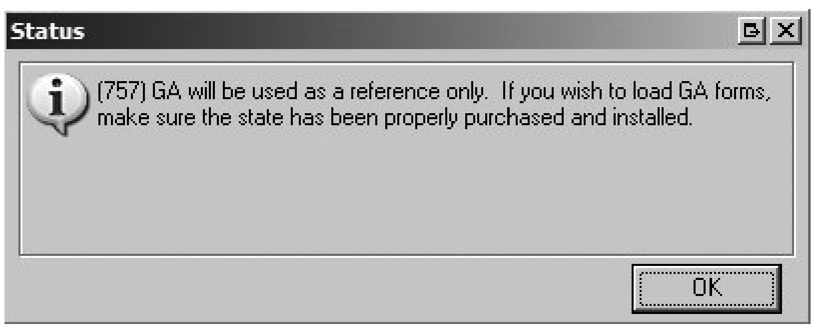
- If you prepare state returns and your state program picks up the Evening Telephone Number instead of the Daytime Number, use F3 to make the Evening Telephone Number for the Taxpayer red.

- You may want to select the Cell phone field and use F3 to make it red.

- **State Information**

  If you prepare state returns and have received your state software from TaxWise, then enter the two letter state abbreviation in the “full year resident” box.

  Note: If you have not loaded your state software, you will receive the following message:



  State forms will not load in the TaxWise tree until you install the state software. You will also receive a message when creating new returns indicating the state has not been installed.

W-2

- Block 15, State: If your state has an income tax, enter your state code.

1099-R

- Block 11, "State/State ID": If your state has an income tax, enter your state code.
- In the state-use boxes (to the left of part 10),
  - If your state has an income tax and if pensions are not taxed, check Box 1.
  - Otherwise, use F3 to take the red off box 1.

Sales Tax Worksheet

- Use F3 to turn off the red in the description field on line 3a.

- On the bottom part of the Sales Tax worksheet, enter your state on line 1. Then answer the remaining questions as they apply to the preponderance of taxpayers in your state or district. Use F3 to mark red those fields that will need to be verified or entered for each return based on where the taxpayer lives.

- If the tax rate varies from site to site, you may want to further customize the Sales Tax Worksheet for each specific TaxWise user later. Come back to this worksheet and enter the answers and values that are most appropriate for taxpayers being served at that site, after the user is assigned to a User Group that permits the user to edit its own Tax Form Defaults.

State forms: **As TCS for a state, you will need to determine appropriate TFDs for your state tax module.**

When you have completed all default form settings. select "File," then "Close Return" to close the "Edit Tax Forms" screens and save your changes.

At this point, the TCS may want to capture and publish the "Admin" user's TFDs customized for their state, for further customization by each district TC.

Level 6 – District-specific Customization of TFDs for the "Admin" user

We do not suggest anything specific that a district TC needs to do to further customize the state-specific TFDs for the "Admin" user for their district. The most important consideration is to coordinate with the district Training Coordinator to assure that the training and technology are synchronized with each other as to what the forms tree and defaults should look like. Some tree pruning may take place at this step.

Level 7A – Site-specific Customization of TFDs for the "Admin" user

If your site information will be different for your different TaxWise users, skip this section and proceed to Part 3 below. Site information will be specified after your specific TaxWise users are created.

If your site information will be the same for all or most of your TaxWise users, you can customize the "Admin" user's TFDs with that site information at this point, as follows:

To open tax form defaults.

- Log in to TaxWise™ with the "Admin" user name.
  Select Tools, then Edit Tax Form Defaults.
- Click on the OK button on the next screen.
- Click the Yes button on the confirm screen.

Main Information Sheet

- **Preparer Information**
  Enter your site's unique eight-digit SIDN in the PTIN field.

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- **Enter the EFIN** assigned to this site at the top of the form. It must be one of the EFINs registered to the TaxWise program, either with a REG code or a Transmit (XMIT) code.

- **Electronic Return Originator (ERO) Information**
    - Click in the "PTIN" field. Enter your site's unique eight-digit SIDN.
    - Click in the "Firm's Name" field. Type the Site Name as shown on Form 8633; do not include the SIDN.
    - Click in the "Firm's Address" field. Type in the site street address.
    - Click in the "EIN" field. Press F3 to remove the red. (No data entered)
    - Click in the "Zip Code" field. Type in the site zip code.

Sales Tax Worksheet

- On the bottom part of the Sales Tax worksheet, verify your state on line 1. Then answer the remaining questions as they apply to the preponderance of taxpayers served by this site. Use F3 to mark red those fields that will need to be verified or entered for each tax return based on where the taxpayer lives.

When you have completed all default form settings. select "File," then "Close Return" to close the "Edit Tax Forms" screens and save your changes.

Part 3 – User Groups and Site-specific Users

In TaxWise 2008, Tax Form Defaults (TFDs) created in the "Admin" user will be copied to all existing users as well as newly created users unless the user is in a group whose members are permitted to create and modify their own TFDs. Users assigned to the "SuperUser" group are no longer allowed to edit their own TFDs. You will need to establish at least one new group if you need unique TFDs for each user. You may want to establish two new groups. One of these groups could be used by EROs only and will include permissions to communicate with the TaxWise Electronic Filing Center. The other could be used by Counselors to prepare, QR, and print returns but would not have permissions to do the things that could potentially interfere with the work of the ERO if used by volunteers who are not EROs.

To establish user names to be used by the EROs only
(Or for all users if you are only creating one new group):

1. Open TaxWise 2008 and select the "Admin' user.
2. Select "Tools," then "Utilities/Setup Options."
3. In the Utility Program, select "Setup," then "Security Manager."
4. Select the "Groups" tab.
5. Select "New."
6. Name the new group "EROs" (Or "Volunteers" if only one group is being created).
7. For description use "User names for use by EROs only." (Or "Volunteers" if only one group is being created).
8. Select all actions for this user group.

(Note: You can highlight the first item by clicking on it, then scroll down to the last action and hold the Shift key while clicking on the last item. This selects all items on the list.)

9. Click on “Add” to transfer all these actions to the new user group.
10. Click “OK.”

For user names to be used by counselors who are not EROs

1. Open TaxWise 2008 and select the “Admin” user.
2. Select "Tools,” then "Utilities/Setup Options."
3. In the Utility Program, select "Setup,” then "Security Manager."
4. Select the "Groups" tab.
5. Select "New."
6. Name the new group “Counselors.”
7. For description use “User names for counselors.”
8. Select all actions for this user group. (Note: You can highlight the first item by clicking on it then scroll down to the last action and hold the Shift key while clicking on the last item. This selects all items on the list.)
9. Click on “Add” to transfer all these actions to the new group.
10. Then, in the right panel, select the following items:
    (Note: Hold down the CTRL key while selecting each item.)
    a. Acknowledgement
    b. Compose/Send Message
    c. The three that start with “Get ….”
    d. The three that start with “Send….”
11. Click on “Remove” to remove these permissions from the “Counselors” group.
12. Click “OK.”

If set up using the above approach, Users (such as site names) assigned to the “Counselors” group will be able to Edit Tax Form Defaults, but will not be able to communicate with the Electronic Filing Center.

Users (such as TRANSMIT etc.) assigned to the “EROs” or ‘Volunteers“ group will be able to carry out all functions in TaxWise, including communicating with the Electronic Filing Center, except for accessing Security Manager, which is reserved for the “Admin” user.

NOTE 1: Creating two new groups assumes that the ERO does not directly transmit from TaxWise users with site user names, but first transfers returns to be transmitted to the TRANSMIT (or some other) TaxWise user that has Electronic Filing Center permissions.

NOTE 2: While normally a user can be assigned to two or more groups and will then have all of the permissions contained in any of those groups, this rule does not apply if one of the groups is “Training” or “SuperUser.” If “SuperUser” is not removed from the groups to which a user is assigned, its lack of permission to Edit Tax Form Defaults will override the permission granted by other groups for that capability.

After creating these one or two new groups, use Security Manager to create a new TaxWise user for each Tax-Aide site in the district. Then use TaxWise Explorer to copy the “Admin” user’s TFDs to all of the site-specific users. Then use the Level 7B procedure below if needed to customize the TFDs for each site-specific user.

Level 7B – Site-specific Customization of TFDs for different sites

If you did not enter site-specific information in the "Admin" user's TFDs in Level 7A above, use the following steps to tailor the TFDs for each TaxWise user for a specific Tax-Aide site.

- Log in to TaxWise™ with the user name for a site.
- Select Tools, then Edit Tax Form Defaults.
- Click on the OK button on the next screen.
- Click the Yes button on the confirm screen.
- Use the steps of the Level 7A procedure above starting with **Main Information Sheet** to set the site-specific defaults for the site.
- Repeat this procedure for each additional site.

End of procedures for setting Tax Form Defaults.

COPYING TAX FORM DEFAULTS FOR TAXWISE ****2007**** AND PRIOR YEARS

The following is for TaxWise 2007 only: TaxWise for years previous to 2007 automatically copied the "Admin" user defaults to any other user created after the "Admin" defaults were entered. TaxWise 2007 does not automatically copy the "Admin" defaults to any other user. Also note that there is no option in TaxWise 2007 to copy these defaults to selected other users; there is an option to copy these defaults to all other users.

TO COPY "ADMIN" DEFAULTS TO ALL OTHER USERS

First create the other user names if they do not already exist:

- Open TaxWise 2007 and select the "Admin" user.
- Select Tools, then Utilities/Setup Options.
- In the Utilities program, select Setup, then Security Manager
- Click on the Users tab, then select New to create a new user.
- When complete click on OK. (Note that there is no opportunity to copy the "Admin" user defaults to the new user name(s).

To copy "Admin" defaults to all other users

- Change to the "Admin" user.
- Select **Tools**, then **Utilities/Setup Options.**
- In the Utilities program, select **File,** then **TaxWise Explorer.**
- Click on the + sign for **USERS** and select "**Admin".**
- For "**Restrict this file list to"** click on the arrow and then scroll up to select **Tax Form Defaults.**
- For **Áction**´ click on the arrow and select **Copy File to another location.**
- For "**Copy** to" click on the arrow and select **All Users.**
- Click on the **Copy** button to copy the "**Admin"** defaults to all other users. There is a final confirmation that the copy was successful.

APPENDIX - SETTING PRINT DEFAULTS

An earlier version of this document quoted verbatim the section from 2008 Pub 3189 on Setting Print Packet Defaults. We have removed that redundant section from this document.

We offer the following cautionary note on this subject that is not contained in Pub 3189.

NOTE on Print Packets: The Print Packets are in the "Admin" user folder with the file names "*.PFL". They can also exist in each username folder.

If there are no print packets in a user other than "Admin," the packets in the "Admin" user will be used whenever the Print Return dialog is invoked from any logged-in user. If there are print packets in the non-"Admin" user that is logged in when the Print Return dialog is invoked, the packets from the logged-in user will be used instead of those from the "Admin" user.

There is a TaxWise bug (that has been around for several years) that deletes all print packets from the "Admin" user if the Print Return dialog is invoked from the "Admin" user when there are no print packets in the TaxWise user where the return that is being printed is located.

There are two ways to avoid the disappearance of the print packets as a result of this bug. The first is to make sure that you never print a return when logged in as the "Admin" user. The second is to copy all of the print packets from the "Admin" user to all of the other TaxWise users. If you do that, you will not be exposed to this bug.